

Europe Luxury Residential Real Estate - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Luxury Residential Real Estate Market size is estimated at USD 131.46 billion in 2025, and is expected to reach USD 159.94 billion by 2030, at a CAGR of 4% during the forecast period (2025-2030).

The luxury residential real estate market in Europe is undergoing significant changes, driven by global expansion strategies and innovations in smart home technologies. Developers in the luxury residential sector are increasingly incorporating green building standards and smart home technologies to attract environmentally conscious buyers. An industry report in November 2024 identified 1,623 smart home startups operating across Europe. Leading companies such as Assa Abloy, F-Secure, Tibber, tado, and Airthings are at the forefront of smart technology integration. These firms offer a comprehensive range of solutions, including mechanical and electromechanical locking, access control, entrance automation, and advanced security systems. The increasing adoption of these technologies underscores the rising demand for technologically advanced luxury homes throughout the region.

In April 2024, Raimon Land (RML), a prominent luxury property developer, announced its strategic plan to enter the European real estate market by 2025. The company projects that within the next 3-5 years, its revenue will be evenly distributed between domestic and international markets, highlighting a strategic emphasis on international growth.

Moreover, tax incentives are playing a crucial role in stimulating growth within specific market segments. For instance, in September 2024, Portugal introduced exemptions for real estate transfer tax and stamp duty for young buyers up to the age of 35 purchasing their first permanent home. This initiative applies to both foreign nationals and Portuguese residents who meet specific residency requirements, thereby encouraging investment in luxury properties while providing financial relief to younger investors.

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Europe Luxury Residential Real Estate Market Trends

France Leads the Luxury Residential Real Estate Market in Europe

France plays a crucial role in Europe's luxury residential real estate market, with Paris and the French Riviera attracting substantial foreign investments. The country's rich cultural heritage, upscale lifestyle, and appealing tax incentives make it a prime destination for wealthy buyers.

Recent research from an industry organization underscores Paris's growing appeal to foreign investors. International buyers account for 8.1% of real estate transactions in the city. Delving deeper, 5.2% are foreign residents in France, and 2.9% come from overseas. The 4th arrondissement stands out, attracting 17% of foreign interest, followed by the 3rd and 12th arrondissements with 16% and 4.9%, respectively.

Outside of Paris, the French Riviera cements its reputation as a top luxury destination. The region, renowned for its upscale properties suited for both primary and secondary residences, saw real estate investments soar to EUR 2.1 billion (USD 2.29 billion) in 2023. Its lasting appeal is a cocktail of a desirable leisure lifestyle, superb connectivity, and a prestigious global standing, drawing the elite from around the world.

France's tax policies significantly influence its luxury real estate scene, particularly for high-net-worth individuals. Starting in 2024, properties valued above EUR 1.3 million (USD 1.42 million) will incur a progressive wealth tax between 0.5% and 1.5%, based on the property's value. These tax considerations are crucial, shaping the investment decisions of wealthy buyers as they navigate France's intricate real estate landscape.

Rising Demand for Luxury Villas and Landed Houses

The European luxury residential real estate market is experiencing significant demand for exclusive properties, particularly luxury villas and high-end residences. This trend is driven by the growing preference for more spacious and private living environments, as well as the continued popularity of areas renowned for their premium offerings. The demand for luxurious villas and homes in Europe remains robust, with notable shifts in pricing and market focus.

According to a September 2024 industry report, Europe's housing market continues to reflect the region's economic health, with emerging shifts in consumer confidence and investment trends. Despite recent economic challenges, Europe's luxury housing market has demonstrated resilience, presenting strategic opportunities for investors in high-end real estate. The easing of interest rates throughout 2024, coupled with a more stable economic environment, has contributed to an optimistic outlook for luxury property buyers and investors in the region.

Furthermore, luxury housing projects in key European markets, such as Spain, have experienced substantial growth. As of October 2024, luxury home prices in Spain have increased by 37% since 2019, particularly for properties valued over EUR 3 million (USD 3.27 million). Areas like Altea, Calpe, Benidorm, and Moraira are experiencing a boom in demand for premium villas. Consequently, Spain's luxury housing market is expected to continue expanding, with the average price of luxury properties projected to rise to EUR 5.4 million (USD 6.02 million) by 2024, reflecting strong demand and market confidence.

Europe Luxury Residential Real Estate Industry Overview

The European luxury residential real estate market is fragmented and highly competitive. Europe's luxury residential real estate market is competitive with the presence of local and international players. Competition and pricing have increased as new investors and developers have entered the market, leading to an increase in the demand and supply of real estate.

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Some of the top players in this market are Mansion Global, Proprietes Le Figaro, Sotheby's International Realty Affiliates LLC, John Taylor, Luxury places SA, Haussmann Real Estate, Rodgaard Ejendomme, Juvel Ejendomme, Barnes International Realty, and Belles Demeures, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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